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INTELLIGENCE BRIEF

AGRICULTURAL SITUATION IN COMMUNIST COUNTRIES
MAY RESULT IN RECORD GRAIN IMPORTS

DIRECTORATE OF INTELLIGENCE
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AGRICULTURAL SITUATION IN COMMUNIST COUNTRIES
MAY RESULT IN RECORD GRAIN IMPORTS

An analysis of the agricultural situation in the USSR, Eastern Europe,* and Communist China as of mid-October 1965 indicates that total grain imports by these countries from the Free World in the consumption year 1965/66** may reach a record level of 23 million to 24 million metric tons (mt). The previous record of 22.6 million mt was set in 1963/64 (see Table 1). Purchase agreements concluded to date provide for total imports of some 18 million to 19 million mt. Communist China currently is negotiating with Canada, Australia, and Argentina for additional wheat. Some of these negotiations relate to long-term agreements (for example, a new three-year agreement with Canada), but it is likely that Communist China will purchase an additional million tons of wheat, and possibly more, for delivery by June 1966. The USSR also may need several million tons in addition to the amount already contracted for. Soviet officials have recently disclosed a need for additional imports of quality wheat. The amount to be imported could depend not only on the quality of the Soviet crop but also on the level of consumption considered necessary by the Soviet leaders. In view of the limitations in supplies and/or port handling capacities in other major wheat-exporting countries, the USSR may approach the United States for part or all of any additional requirements. Similarly, some of the countries of Eastern Europe may also approach the United States for grain, but their interest is more likely to be in the purchase of feed grains -- for which requirements still amount to some 2 million mt.

Agricultural output in the USSR in 1965 probably will be slightly below the level achieved in 1964. A decrease in the production of crops should be largely offset by an increase in the output of livestock products. As a result of the relatively poor wheat crop in 1965, the USSR signed in July-August 1965 purchase agreements for about 7 million mt of wheat from the West. In addition, as of 1 July 1965 more than 2 million mt remained to be delivered in 1965/66 under earlier agreements. Although the availability of wheat per capita in 1965/66 will be significantly higher than in 1963/64, several million additional tons would be needed to bring the availability per capita up to the average for the period 1954/55 through 1962/63. Nevertheless, the food situation in 1965/66, in general, should be considerably better than in 1963/64, when severe shortages of staple food items were widespread and the quality of bread was drastically

* Albania, Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Rumania, and Yugoslavia

** Beginning 1 July 1965

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reduced. At the recent Party Plenum, Brezhnev assured the population that "everything necessary" had been done "to insure a normal supply of bread products in the country."

The agricultural situation in most countries of Eastern Europe in 1965 is mixed, with a decline in crop production being at least partly offset by an increase in livestock production. Total grain production is currently estimated to be about 5 percent below that of last year and about the same as in 1963 (see Table 2). Although most countries had an excellent harvest of breadgrains (largely winter grains), the output of spring grains and row crops is down. It is estimated, therefore, that Eastern Europe will again need to import a total of approximately 9 million mt of grain in 1965/66, or about the same amount as last year. Yugoslavia already has approached the United States for 1.35 million mt of wheat under Public Law 480 arrangements. It is likely that several other Eastern European countries also may come to the United States for grain -- but probably for feed grains rather than wheat. However, if these countries are unable to obtain enough high-quality wheat from other sources or if the USSR fails to honor its commitments to East Germany and Czechoslovakia, purchases of wheat may also be made.

Production of grain in Communist China in 1965 is estimated to be about the same as the mediocre crop of 170 million to 175 million mt harvested in 1964. The size of the harvest in 1965, however, is still heavily dependent on the outcome of the late grain crops, which in some areas will not be harvested until the latter part of November. As in recent years, the growth of population has again exceeded any likely increase in the production of grain; however, Chinese Communist imports of grain and the increased consumption of subsidiary foods -- primarily leafy vegetables, fruits, and animal products produced mainly on private plots -- have compensated in part for the stagnation in domestic grain production.* In recent years Communist China has purchased some 5 million to 6 million mt of grain annually from the Free World. This level of imports is likely to be maintained in 1965/66.

1. USSR

Production of grain in the USSR in 1965 will be about 100 million mt, a decrease of one-sixth from the level of the harvest in 1964 but almost

* For a more detailed discussion of the current agricultural and food situation in Communist China, see CIA/RR CB 65-62, Little Change in Chinese Communist Agricultural Situation Expected in 1965, October 1965, SECRET.

one-tenth larger than the disastrous crop in 1963. As of 5 October, about 12 million hectares of small grains (about 10 percent of the total) had not been harvested. The slow rate of harvesting since mid-September suggests that several million hectares will not be harvested before the onset of winter. As in 1963, the yield of spring wheat in some sections of the country probably is so low that it is not worth harvesting. In addition, a relatively large amount of wheat from the crop in 1965 apparently is of poor quality because of excessive rainfall during the harvest of winter wheat and because of the severe drought in the major spring wheat areas.

25X6□

Soviet officials have recently disclosed [REDACTED] that the USSR has a need for imports of quality wheat in addition to the amounts already contracted for. Such imports would be required if Soviet leaders decide that per capita availabilities of wheat are to approximate the average for the nine-year period 1954/55 through 1962/63. Thus it seems likely that the USSR could be in the market for additional imports of wheat.

Weather during the 1965 growing season did not affect the nongrain crops in the USSR as adversely as it did the grain crop. Production of potatoes, vegetables, sugar beets, cotton, and sunflowers will be below the record or near-record levels of 1964, but in general will be significantly better than the relatively poor crops in 1963.

Overall production of livestock products in 1965 is expected to reach a new peak, representing a marked improvement over the relatively poor performance of this sector of agriculture in 1964. The amount of meat, milk, and eggs produced in 1965 apparently will be about equal to or in excess of previous record levels. Because of a decline in the number of sheep, however, production of wool in 1965 will be somewhat less than in 1964.

Currently, prospects for the livestock sector during the coming winter are not as promising as at the same time a year ago. Although supplies of succulent and coarse feeds will be fairly good in the most important livestock-producing areas, the drought in Kazakhstan and Siberia has drastically reduced the production of feed crops and hay in those regions, and some distress slaughtering of animals will probably take place. Furthermore, primarily because of a reduction in the acreage of corn for grain, production of coarse grains (barley, oats, and corn) will be little if any higher than in 1963 and will tend to impede the development of swine and poultry husbandry.

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2. Eastern Europe

A bumper harvest of breadgrains (wheat and rye) is currently expected in all countries in Eastern Europe except Albania and Yugoslavia. The quality of grain in East Germany and Czechoslovakia is down, however, and the high moisture content of grain could result in high storage losses. The production of coarse grains, especially corn, is well below the level of the past two years. A combination of spring floods, lack of sunshine, and drought (in the Balkans) has contributed to a decrease in acreage and total output of coarse grains in all countries except Poland. Thus, in spite of a good harvest of breadgrains, total grain production in Eastern Europe this year will be below that of 1964 and in several countries will be below the 1957-61 average.

Production of most fall-harvested crops is expected to be less than in 1964. Planted acreage for the important crops of potatoes and sugar beets is down, and yields have been adversely affected by weeds, unfavorable growing conditions, insects, and a shorter growing season. Harvesting of root crops and corn started as much as four weeks late and is overlapping the fall plowing and sowing season for winter grains. The situation is especially serious in the northern countries, where an early winter freeze could catch potatoes and sugar beets in the ground or in open storage. The sharpest drops in the output of potatoes from 1964 levels are expected in Czechoslovakia (45 percent less), followed by Poland (25 percent less), and East Germany (10 percent less). In addition to a lower output, the storage quality of potatoes is unfavorable, and the sugar content of beets is below normal.

The production of fruits and vegetables will be smaller this year in all countries, with the most serious shortfalls occurring in the major producing and exporting countries of Hungary, Rumania, and Bulgaria. These crops were first damaged by a wet spring and then by a drought that set in about mid-May in parts of Rumania and Bulgaria and continued through September. State procurement of fruits and vegetables has fallen significantly below plan throughout Eastern Europe in spite of higher prices.

A favorable aspect of Eastern European crop production this year was the relatively good harvest of forage crops and good pasture. Although the quality of the hay may have been adversely affected by delayed harvesting and frequent rains in northern areas, output was better than a year ago. This output has been reflected in higher levels of production and procurement of milk and meat than a year ago in

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Poland, East Germany, and Czechoslovakia. A shortfall in the output of feed grains, fodder roots, and potatoes, however, will adversely affect the outlook next year for meat production -- especially pork -- and the capability of maintaining current numbers of hogs and poultry in 1966. Officials in East Germany and Bulgaria have already expressed concern that increased production of meat has been at the expense of livestock numbers.

Prospects for any improvement in the food supply before next year's harvest are less favorable than at this time a year ago. Consumer supplies of green vegetables, fruit, and potatoes are tighter and higher priced than a year ago with no relief in sight. The shortfall in production of concentrated feed probably will not be adequately supplemented by imports so that output of livestock products -- for which demand currently exceeds supply -- may drop off in 1966. Thus, unless countries such as East Germany and Czechoslovakia increase imports and the other countries curtail exports of meat, governments may be forced once more to raise retail prices or to take other measures to curtail demand for meat. An excellent wheat harvest in Bulgaria, however, should eliminate the bread shortage in that country.

Eastern Europe -- including Yugoslavia -- will need to import at least 9 million mt of grain during 1965/66. (In 1964/65 the countries of Eastern Europe imported about the same amount, nearly 6 million tons of which came from the Free World.) Although the good bread-grain harvest this year reduced import requirements for wheat, increased need for feed grains will more than offset this reduction. In view of negotiations now in progress with Free World countries and expected deliveries from the Soviet Union and possibly Rumania, it is estimated that the Eastern European countries have already largely satisfied their wheat import requirements for 1965/66. Of the 1.5 million to 2 million mt of feed grains likely to be obtained in the Free World, however, only 320,000 mt have been purchased to date, compared with 1 million mt purchased in 1964/65. These data suggest that Eastern Europe -- especially Poland, Czechoslovakia, Hungary, and East Germany -- may be more interested in purchasing feed grains, soybeans, and soybean meal from the United States, rather than wheat. The inability or unwillingness of the USSR to deliver sufficient quantities of milling quality wheat to East Germany and Czechoslovakia, however, could increase their interest in US wheat. Rumania will be the only net exporter of grain (mostly corn) but at a lower level than in 1964/65.

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Table 1

Imports of Grain by the Communist Countries from the Free World
Consumption Years 1963/64 - 1965/66

Country	1963/64	Preliminary a/ 1964/65	Contracts a/ 1965/66
USSR b/	11,066	2,166	9,480 c/
Communist China	5,854	5,350	4,500
Eastern Europe	5,638	5,913	4,475
Albania d/	120	147	50
Bulgaria	542	261	100
Czechoslovakia	504	746	400
East Germany	503	832	600
Hungary	790	300	275
Poland	2,319	2,266	1,500
Yugoslavia	860	1,361	1,550
Total	<u>22,558</u>	<u>13,429</u>	<u>18,455 e/</u>

a. Based on information available on negotiations, contracts, or shipments as of 12 October 1965.

b. Including wheat or flour shipped to Eastern Europe, Cuba, and the UAR.

c. Including more than 2 million metric tons from purchase agreements signed in 1964/65 but not delivered by 1 July 1965. The delivery schedules of some contracts run through July 1966 and thus perhaps some 700,000 metric tons may not be shipped by the end of the trade year (30 June 1966).

d. Financed by Communist China.

e. Additional purchases -- possibly 2 million tons each for the USSR and for Eastern Europe and another million tons for Communist China -- may bring this total up to some 23 million tons.

Table 2

Production of Grain in Communist Countries
1963, 1964, 1965 Preliminary, and Annual Average

	Million Metric Tons			
	<u>1965 Preliminary</u>	<u>1964</u>	<u>1963</u>	<u>Annual Average ^{a/}</u>
USSR				
Total grain ^{b/}	100	120 [125]	92 [95]	105 [111]
Of which:				
Wheat	48	58	40	55
Eastern Europe ^{c/}				
Total grain	54	56.2	54.2	53.5
Of which:				
Breadgrains	28	27.3	26.7	27.2
Communist China				
Total grain ^{d/}	170 to 175	170 to 175	175	174
Of which:				
Harvested in early summer ^{e/}	41	45	43	N.A.

a. 1958-62 for the USSR and Communist China, and 1957-61 for Eastern Europe.

b. Excluding immature corn. The figures in brackets include immature corn converted to grain equivalents.

c. Including Albania and Yugoslavia.

d. Including tubers on a grain-equivalent basis of 4 metric tons of tubers to 1 metric ton of grain.

e. Excluding tubers.

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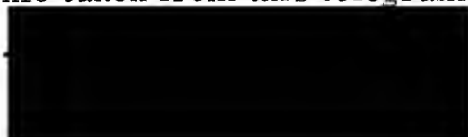
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